



Build Better More: A Glimpse into the Philippines' Infrastructure Program

January 2023



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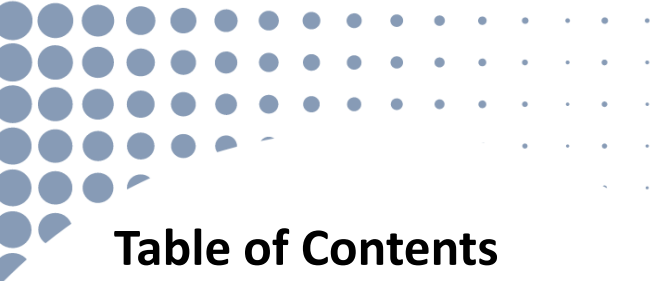


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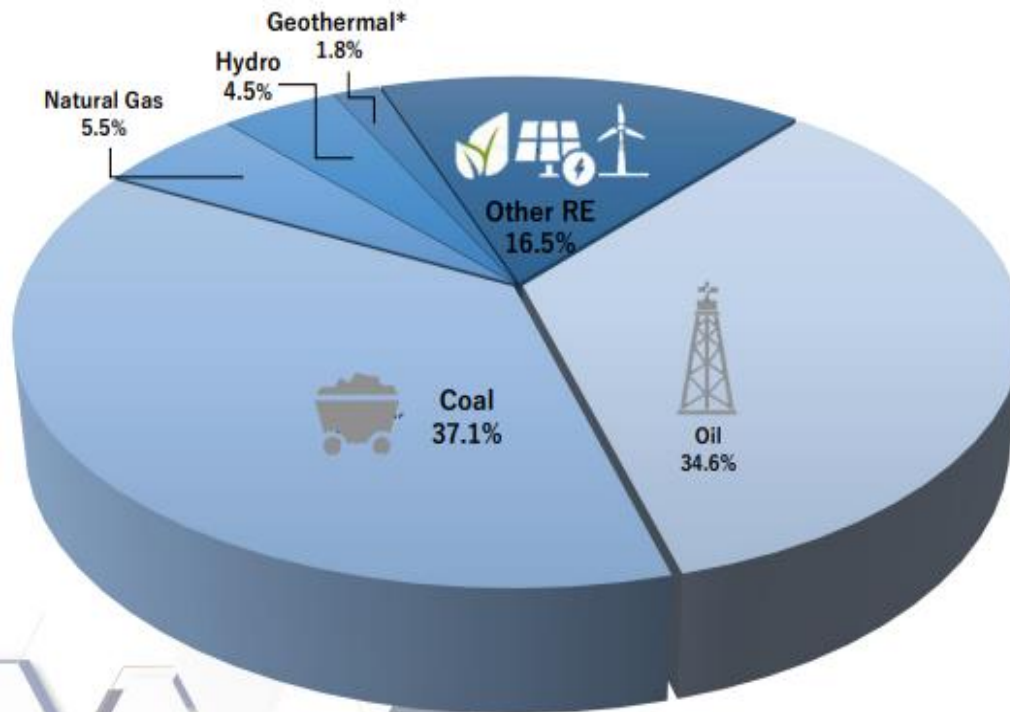


Department of Energy

The Philippines aims for a sustainable, stable, secure, sufficient, and accessible energy

“The use of renewable energy is at the top of our climate agenda. We will increase our use of renewable energy sources such as hydropower, geothermal power, solar, and wind.” – President Ferdinand Marcos, Jr. (State of the Nation Address, July 2022)

Total Primary Energy Supply 2021



50.9 MTOE

2021 TOTAL PRIMARY ENERGY SUPPLY

43.2%

(22.0 MTOE)
INDIGENOUS

56.8%

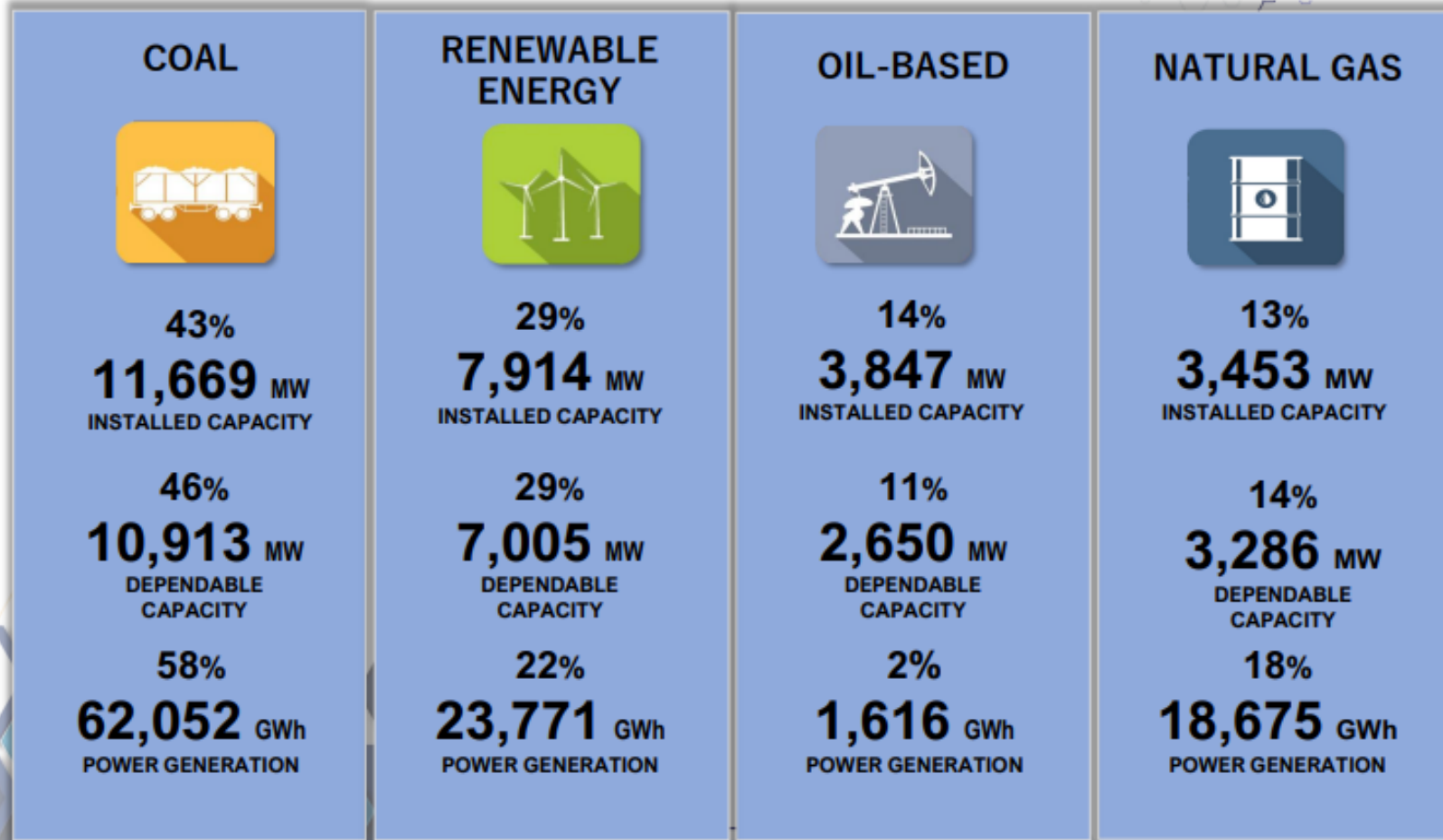
(28.9 MTOE)
NET IMPORTED

Oil Coal Natural Gas Hydro Geothermal Other RE

The Philippines intensifies efforts towards clean energy fuels and efficient technologies to diversify the country's energy supply mix.

The government is committed to enhance the country's renewable energy capacity and further increase its share in the current generation mix.

On-Grid Power Capacity and Generation Mix 2021



16,036 MW
2021 PEAK DEMAND

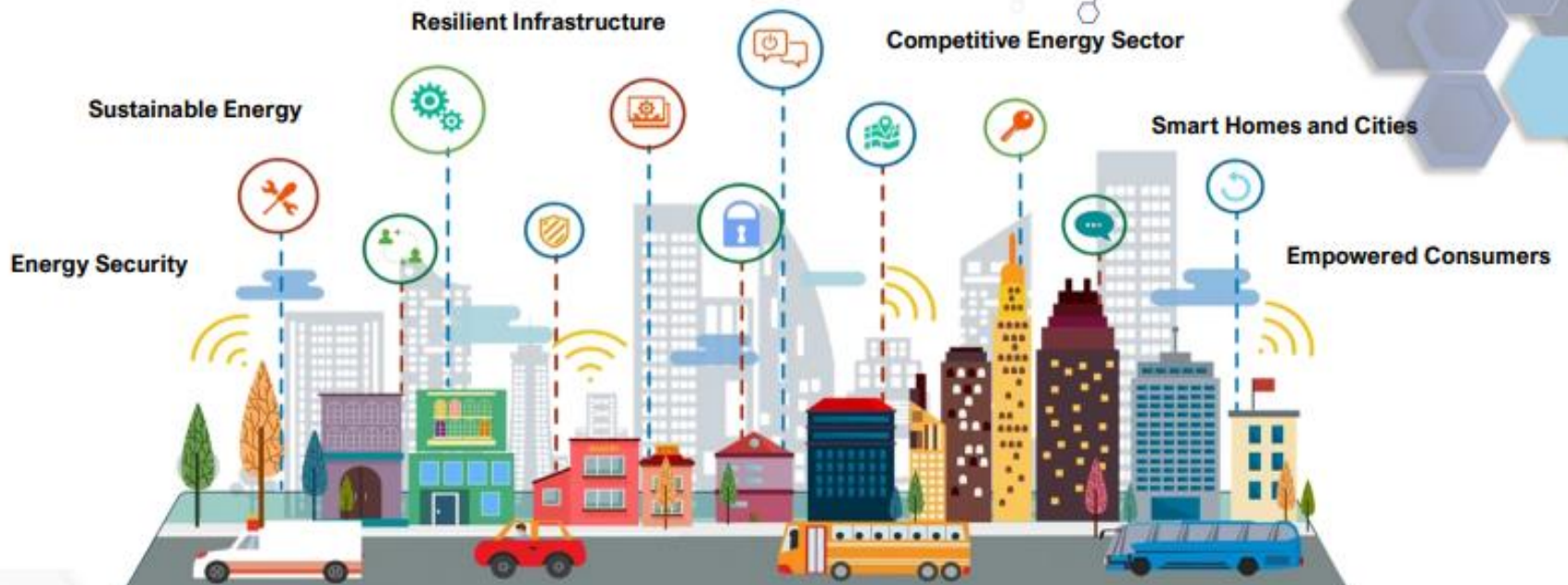
LUZON: 11,640 MW
VISAYAS: 2,252 MW
MINDANAO: 2,144 MW

106,114 GWh
Indigenous: 45.1%
Imported: 54.9%

RE Share: 22%
Fossil Share: 78%

The realization of energy supply security in the long-term requires a harmonious interplay of the various energy sub-sectors and a well-coordinated energy value chain for stability, from resource development up to utilization.

Future Energy Scenario



Renewable Energy
35% of power generation mix by 2030; and 50% by 2040

Energy Efficiency and Conservation
5% energy savings on oil products and electricity by 2040

Emerging and Innovative Technologies
10% EV penetration rate in road transport by 2040; Exploring new and efficient technologies

Information and Communications Technology
Adopting advanced and interoperable ICT in the energy chain

Energy Resiliency
Resilient and climate-proof energy infrastructure

As the government gradually shifts from fossil to cleaner and more sustainable energy technologies, the Department of Energy is moving fast to meet this transformational goal. The priority is on policies and regulatory framework that will mobilize and accelerate Renewable Energy (RE) deployment.

RE Policies and Programs

RENEWABLE PORTFOLIO STANDARDS (RPS)

– GRID AND OFF- GRID

Requires all load-serving entities to source or produce a specified portion of their supply from eligible RE facilities

RE MARKET (REM)

Serves as the venue for the transparent and fair trading of RE Certificates

PREFERENTIAL DISPATCH OF RE

All RE generating units are given preference in the Wholesale Electricity Spot Market dispatch schedule to ensure its maximum output injection in the grid.

ENHANCED NET-METERING PROGRAM

Allows end-users to generate electricity from RE-based systems up to 100 kW for own use and sell their excess to the grid

GREEN ENERGY OPTION PROGRAM (GEOP)

Provides end-users the option to choose RE resources as their source of energy

GREEN ENERGY AUCTION PROGRAM (GEAP)

Intends to provide additional market for RE through a competitive electronic bidding of RE capacities

RE TRUST FUND

Pursuant to Section 28 of the RE Act, the RETF was established to promote the development and greater utilization of RE

OMNIBUS GUIDELINES FOR RE CONTRACTS

Aims to harmonize and enhance existing guidelines governing the application and awarding of RE Contracts

PRODUCTIVE USES OF RE (PURE)

Involve the utilization of RE for activities that enhance income and livelihood, and deliver social services, particularly in rural and off-grid areas.

RE RESOURCE DEVELOPMENT

Geothermal Energy, Offshore Wind, Waste-to-Energy, Ocean and Tidal Energy, Expanded Rooftop Solar Program



- Recognizing that the energy sector is a capital-intensive venture, the DOE envisages a more active private sector participation and public-private partnerships (PPP) to pour in the required investments over the planning period.

Energy Investment Requirements



USD 153 Billion
Total Required Energy Investments

UPSTREAM



USD 10.05 Billion
Oil and Gas Exploration
and Development



USD 13.12 Billion
Coal Exploration and Production



USD 510 Million
Renewable Energy
(Pre-Development Activities)

DOWNSTREAM



USD 2.94 Billion
Oil Distribution Depots and
Import Terminals



USD 1.78 Billion
Liquefied Natural Gas (LNG) Terminals

USD 2.38 Billion
Biofuels Production

POWER



USD 115.3 Billion
Construction of New Power
Plants

Conventional: **USD 21.0 Billion**
Renewable Energy: **USD 94.3 Billion**



USD 6.97 Billion
Transmission Projects



Department of Public Works and Highways

The government is committed to continue and further expand the “Build, Build, Build” program.

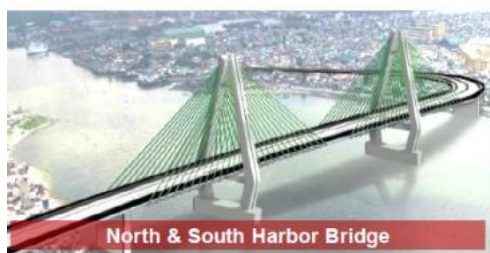
“I would like to reiterate the marching order of the President during his State of the Nation Address...the infrastructure development program will be pursued relentlessly” – Sec. Bonoan, DPWH



DPWH STRATEGIC INFRASTRUCTURE PROGRAMS IN SUPPORT OF THE PRESIDENT’S 8-POINT SOCIOECONOMIC AGENDA

8-Point Socioeconomic Agenda	DPWH Key Priority Programs	Target Outcomes
<p>Near-Term Agenda (Protect the Purchasing Power of Families)</p> <ul style="list-style-type: none"> • Ensure Food Security • Reduce Traffic and Logistic Costs • Reduce Energy Costs <p>Medium-Term Agenda (Create more Jobs, Quality Jobs)</p> <ul style="list-style-type: none"> • Improve Infrastructure • Establish, Livable and Sustainable Communities 	<p>Traffic Decongestion Program</p> <ul style="list-style-type: none"> • High Standard Highways and Expressways • By-passes and diversion roads • Flyovers, interchanges and underpasses • Expansion / widening of national roads and bridges 	<ul style="list-style-type: none"> • Increase road network capacity • Expand the country’s High Standard Highways / Expressways from 510 kilometers to 1,816 kilometers • Reduce travel time between Ilocos in the North and Bicol in the South from 20 hours to just 9 hours.
	<p>Integrated and Seamless Transport System Program</p> <ul style="list-style-type: none"> • Improve Daang Maharlika Highway • Construct Inter-Island Linkage/Mega Bridge Program • Connect gaps along national roads • Improve roads leading to growth corridors in Mindanao 	<ul style="list-style-type: none"> • Improve Inter-Region and Inter-Island Connectivity for a seamless transport system
	<p>Rural Roads Convergence Program</p> <ul style="list-style-type: none"> • Construct/upgrade access roads leading to designated tourism destinations, industry and trade corridors, RORO ports / seaports, railway stations and airports. • Construct Farm to Market/Farm to Mill Roads under the Agri-Infrastructure Support Program 	<ul style="list-style-type: none"> • Improve access to tourism destinations to increase tourism arrivals. • Improve access to industry corridors to lower transport costs. • Build FMRs based on FMR Masterplan to connect to national highways
	<p>Livable, Sustainable & Resilient Communities</p> <ul style="list-style-type: none"> • Flood Management Program • Integrated Water Resources Management Program • Bridges Seismic Improvement Program • Basic Social Infrastructure Support Program (Evacuation Centers and School Facilities) • Infrastructure Support for Marginalized Sectors (i.e. physically challenged, elderly, women, children) • Active Transport Program (Bike lanes and Pedestrian Infrastructure) 	<ul style="list-style-type: none"> • Protect lives and properties from natural disasters • Build disaster-resilient structures especially in calamity-prone areas • Promote zero carbon footprint.

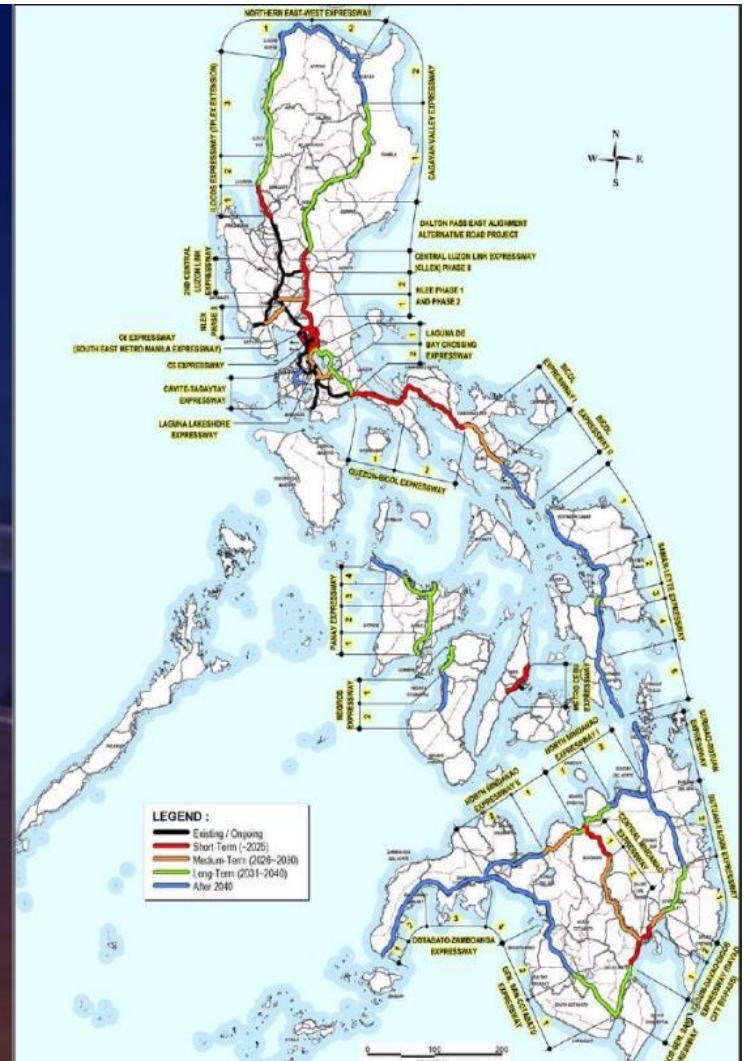
Bridges will be constructed in the area to provide alternative linkages between major thoroughfares and increase the number of usable roadways that would decongest traffic in EDSA and other major roads in Metro Manila



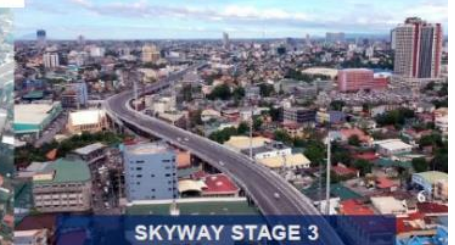
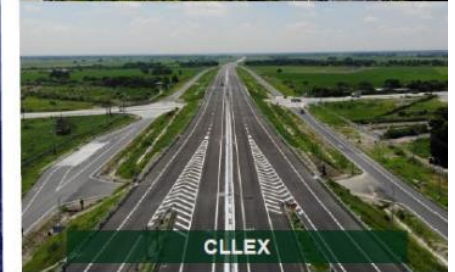
The government will continue to address traffic congestions along vital road networks in the country particularly in highly urbanized areas through projects under the Master Plan on High Standard Highway Network Development.

Philippine High Standard Highway Network Program

Increase the country's High Standard Highways / Expressways from 510 kilometers to 1,816 kilometers based on HSH Master Plan Phases I and II



Expanding the country's highways and expressways network will alleviate overconcentration of population and development in the urban areas and will give way to regional development.



The Inter-Island Linkage / Mega Bridge Program will provide linkages among the various islands of the country through the construction of a series of short and long span bridges.



Bataan-Cavite Interlink Bridge



Samal Island-Davao City Bridge



Panguil Bay Bridge



Cebu-Mactan Bridge (4th Bridge)



Panglao-Tagbilaran City Offshore Bridge



Panay-Guimaras-Negros Island Bridges



Government aims to modernize the country's infrastructure backbone to sustain rapid growth, attract investments and spread economic opportunities for all Filipinos.

DPWH MAJOR INFRASTRUCTURE PROJECTS

CAVITE-LAGUNA EXPRESSWAY

45 km expressway connecting CAVITEX in Kawit, Cavite and SLEX-Mamplasan interchange in Biñan, Laguna
Project Cost: P35.7 Billion
Target Completion Date: December 2023
Status: 59% complete



NLEX-SLEX CONNECTOR ROAD

8 km elevated expressway from the end of Seg. 10 in C3 Road, Caloocan City to PUP Sta. Mesa, Manila & connecting to the Skyway Stage 3
Project Cost: P23.2 Billion
Target Completion: June 2023
Status: 67% complete



CENTRAL LUZON LINK EXPRESSWAY

30 km. (Tarlac City - Cabanatuan City, Nueva Ecija)
Project Cost: P14.9 Billion
Target Completion Date: March 2023
Status: 97% complete. Aliaga Interchange to San Juan Interchange Section proposed for inauguration in Feb. 2023



FLOOD RISK MANAGEMENT PROJECT IN CAGAYAN DE ORO RIVER

Project Cost: P8.5 Billion
Target Completion Date: August 2023
Status: 98% complete. Contract Package 2 (Consolacion) proposed for inauguration in Feb. 2023



SAMAR PACIFIC COASTAL ROAD

11.6 km (including 3 bridges)
Project Cost: P1.1 Billion
Target Completion Date: 2023
Status: 77% complete. Proposed for inauguration in June 2023



IMPROVING GROWTH CORRIDORS IN MINDANAO ROAD SECTOR PROJECT

151.96 kms. (7 road subprojects), Guicam Bridge and Taw-Tawi Bridges
Project Cost: P25.3 Billion
Target Completion Date: 2024
Status: 10 sub-projects - 50% complete. 3 Sub-projects proposed for inauguration in March 2023



The government aims to modernize the country's infrastructure backbone to sustain rapid growth, attract investments and spread economic opportunities for all Filipinos.

DPWH MAJOR INFRASTRUCTURE PROJECTS

ROAD NETWORK DEVELOPMENT PROJECT IN CONFLICT-AFFECTED AREAS IN MINDANAO

175 kms. access roads
Project Cost: P12.9 Billion
Target Completion Date: Dec. 2028
Status: 4 contract packages on-going. Proposed for inauguration in May 2023



LAGUNA LAKESHORE ROAD NETWORK

51 kilometer Road Network along Laguna Lakeshore
Project Cost: P171.8 Billion
Target Completion Date: 2026
Status: DED-70% complete.



BATAAN-CAVITE INTERLINK BRIDGE

32 km bridge connecting Mariveles, Bataan and Naic, Cavite
Project Cost: P175.6 Billion
Target Completion Date: 2028
Status: DED-60% complete.



PANGUIL BAY BRIDGE

3.17 km Bridge connecting Tangub, City, Misamis Occidental to Tubod, Lanao del Norte.
Project Cost: P7.4 Billion
Target Completion Date: December 2023
Status: 61% complete



SAMAL ISLAND-DAVAO CITY BRIDGE

Cable-stayed bridge (extradosed) with a total length of 3.98 km
Project Cost: P23.0 Billion
Target Completion Date: August 2027
Status: Ground Breaking Ceremony on October 27, 2022



DAVAO CITY BYPASS CONSTRUCTION PROJECT

46 km highway including 2-2.3 km mountain tunnels
Project Cost: P46.8 Billion
Target Completion Date: January 2026
Status: 21% complete





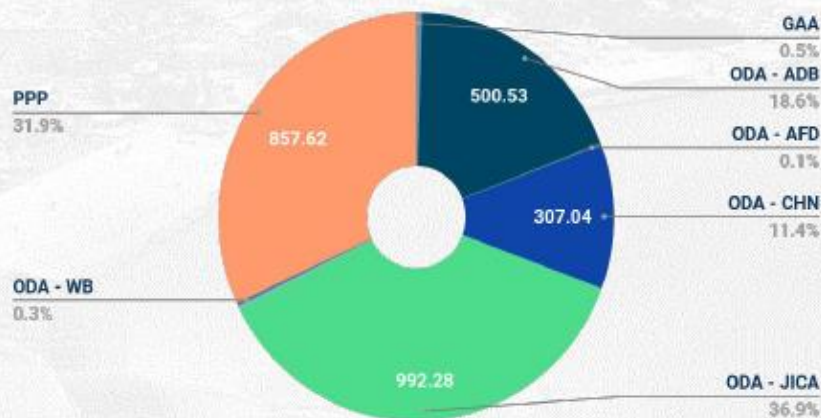
Department of Transportation

The Department of Transportation (DOTr) provides the backbone for growth and enhances the country's competitive edge by providing effective and efficient transportation infrastructure systems that connect the country, its islands, and its people to the rest of the world.

DOTr will BUILD BETTER by...

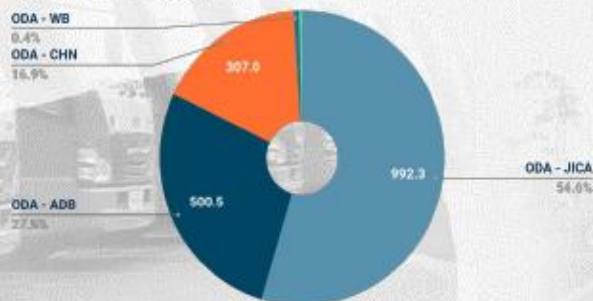
BROADENING AND DIVERSIFYING FUNDING STRATEGIES

Projects Funding Mix 2022 (In B PHP)



Projects Funding Mix	2022	% of Total
ODA - JICA	992.3	36.91%
PPP	857.6	31.90%
ODA - ADB	500.5	18.62%
ODA - CHN	307.0	11.42%
GAA	13.1	0.49%
ODA - WB	7.8	0.29%
ODA - AFD	3.2	0.12%
ODA - KEXIM	6.2	0.23%
ODA - ADB (ASEAN-IF)	0.8	0.03%
TOTAL	2688.5	100.00%

ODA Funding Mix 2022 (In B PHP)



ODA Funding Mix	2022
ODA - JICA	54.59%
ODA - ADB	27.53%
ODA - CHN	16.89%
ODA - WB	0.43%
ODA - AFD	0.17%
ODA - KEXIM	0.34%
ODA - ADB (ASEAN-IF)	0.05%
TOTAL	100.00%

Legend:

ODA-Official Development Assistance
 ADB-Asian Development Bank
 CHN- China
 WB- World Bank
 AFD-Agence Française de Développement
 KEXIM- Korea Eximbank
 ASEAN-IF-ASEAN Infrastructure Fund
 JICA-Japan International Cooperation Agency

The government will continue to implement the Build, Build, Build (“BBB”) Program, with a more diversified funding strategy and strategic utilization of PPPs.

Investment-Approved PPP Projects; Pre-Construction and Ongoing Construction

LIST OF PROJECTS (not exhaustive)

PROJECT	New Manila Int'l. Airport (Bulacan)	Clark Int'l. Airport Expansion Project	Caticlan Airport Development Project	LRT-1 Cavite Extension	MRT-7	Taguig Integrated Terminal Exchange
Indicative Cost	PHP 735.60 Billion	PHP 12.55 Billion	PHP 2.506 Billion	PHP 64.915 Billion <i>(inc. ODA Component)</i>	PHP 77 Billion	PHP 5.20 Billion <i>(inc. access ramp & land cost)</i>
PPP Structure	BOT	BT	CAOT	BTO	BGTOM	BTO
Cooperation Period	50 years	None	25 years	32 years <i>(inclusive of construction)</i>	25 years	35 years <i>(inclusive of construction)</i>
Location	Region III	Region III	Region VI	NCR, Region IV-A	NCR, Region III	NCR
IA	DOTr	BCDA	CAAP	DOTr, LRTA	DOTr	DOTr
Private Proponent	San Miguel Aerocity Inc. 	Megawide-GMR Construction Joint Venture, Inc. 	Trans Aire Development Holdings Corporation 	Light Rail Manila Corporation 	SMC-Mass Rail Transit 7, Inc 	ARCA South Integrated Terminal Incorporated (ASITI) 

New Manila International Airport – Planned to be the largest airport in the Philippines with an initial capacity of 35 mn passengers, 100 mn passengers once fully completed annually. This new international gateway is positioned to serve Metro Manila as well as its neighboring regions

Clark International Airport Expansion Project –a new passenger terminal to double the capacity of Clark International Airport, one of the country’s busiest gateways, to 8 mn passengers per year.

Caticlan Airport Development Project –to upgrade Caticlan Airport, nearest airport to Boracay Island





LRT-1 Cavite Extension - to increase the LRT-1’s capacity from 500,000 to 800,000 daily and extend to highly populated city southwest of Manila. (This extension will reduce travel time between Baclaran, Paranaque and Bacoor, Cavite to 25 minutes, from one hour and 10 minutes.)

MRT-7 – The project involves the financing, design, construction, operation & maintenance of the 23-kilometer elevated railway line connecting the capital to a highly urbanized areas of Bulacan, an adjacent province.

Taguig International Terminal Exchange - A six-storey building on a 5.57 hectare property which would house a passenger concourse, centralized ticketing area and several business and retail establishments.

The government will implement a more holistic Build, Build, Build (“BBB”) Program, including strategic utilization of PPPs.

Upcoming PPP Projects according to Project Preparation Partner

 PPP CENTER Project Development and Monitoring Facility (PDMF)	 ASIAN DEV'T. BANK Office of Public-Private Partnership (OPPP)	 WORLD BANK GROUP International Finance Corporation (IFC)	 OTHERS
MaPaLLa Ferry Capacity Expansion and Level of Service Improvement	NAIA Rehabilitation, Capacity Expansion, and O&M	9 Unsolicited Proposals for Regional Airports New Bicol, New Bohol, Laguindingan, Iloilo, Puerto Princesa, Bacolod-Silay, Davao, Kalibo, and Siargao	Sangley Airport Redevelopment
Seafarers Training Vessels Acquisition and O&M	Metro Manila Subway Project O&M		Various Toll Roads Construction and O&M
Solicited PPPs for Railway Projects North Long Haul, San Mateo Railway, Northern Mindanao Railway	North-South Commuter Railway System O&M	Solicited PPPs for Other Regional Airports	
LTRFB IT	MRT-3 O&M	Cebu Bus Rapid Transit* Bus Supply and O&M	
NSCR EDSA Busway O&M, Capacity Expansion, and Level of Service Improvement	MRT-4 O&M	Air Traffic System (ATS)/ Air Navigation System (ANS)	
Bike Sharing	Davao Public Transport Modernization Project O&M	6 Unsolicited Proposals for Railway Projects LRT 6A, LRT 6B&C, C5 MRT 10, MRT 11, Fort Bonifacio Sky Train, Cebu Monorail	
National Transportation Database	Philippine Automated Fare Collection System AFCS Central Clearing House		

The Manila Bay-Pasig River-Laguna Lake (MAPALLA) Ferry System Project- involves the development of a ferry system that would traverse the waterways in Mega Manila and provide commuters an alternative mode of transport

Ninoy Aquino International Airport- rehabilitation, capacity expansion and operations and maintenance (O&M) of the main international gateway to the Philippines

Metro Manila Subway Project- Operations and Maintenance (O&M) of the subway that will decongest the capital’s major thoroughfare and expand the public transport network

North-South Commuter Railway (NSCR) – O&M of 163-kilometer urban rail transit system allows greater connectivity between Central Luzon and Southern Luzon

MRT 3- O&M of an existing light rapid transit system line in Metro Manila

MRT 4- O&M of a railway project that will connect the capital to adjacent highly urbanized province

Sangley Airport- Construction of a new airport that will serve as an alternative to the NAIA

Addressing Economic Losses and Traffic Congestion in Key Urban Centers

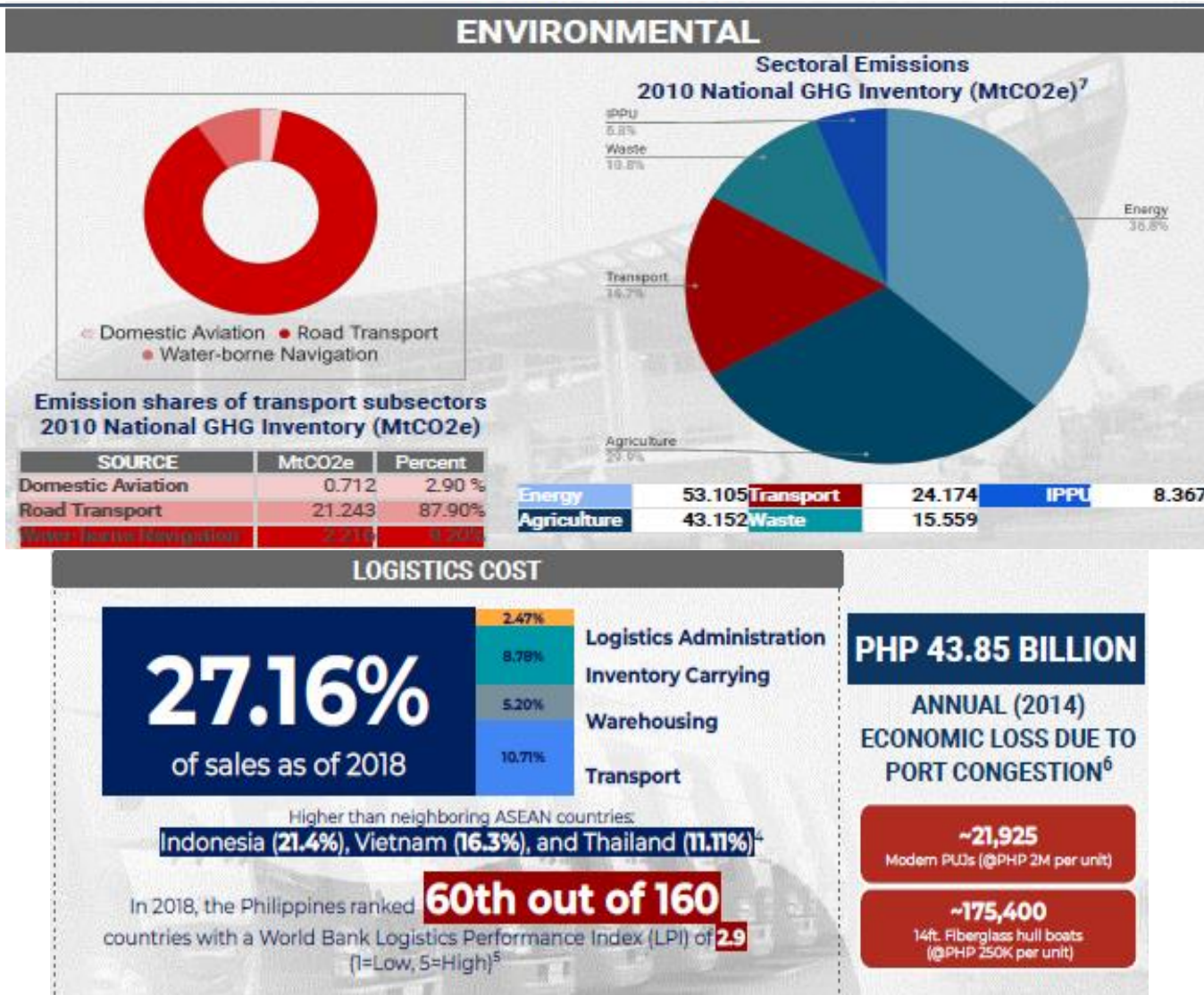


[1] Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future Insight Report. World Economic Forum. May 2022.

[2] Roadmap for Transport Infrastructure Development for GCR (JICA 2019)

[3] Philippines's Road Safety Country Profile (World Bank - Global Road Safety Facility 2016)

Addressing Environmental and Logistical Challenges



[4] An Assessment of Logistics Performance of Manufacturing Firms in the Philippines (DTI and IFC (WB) 2018)

[5] Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future Insight Report. World Economic Forum. May 2022.

[6] Philippine Institute of Development Studies (PIDS 2014)

[7] 2010 Philippine National GHG Inventory (Climate Change Commission)

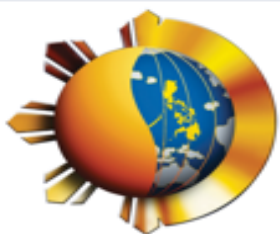


Public-Private Partnership Center

Reconfiguring public – private partnerships (PPP) can help address cross-cutting issues of a weak competition environment and the digital divide, as well as boost the country’s campaign to attract foreign investments.

“Public Private Partnerships or PPPs hold great potential for that expansion, for infrastructure development and for innovation.”
– President Ferdinand Marcos, Jr.

PPP Center of the Philippines



PUBLIC-PRIVATE PARTNERSHIP
CENTER

The PPP Center facilitates the implementation of the country’s PPP Program. It serves as a central coordinating and monitoring agency for all PPP projects in the country.



Provide technical assistance in **PROJECT DEVELOPMENT AND IMPLEMENTATION**



Advocate for **POLICY** reforms to enhance enabling environment



Provide technical assistance in **PROJECT MONITORING AND EVALUATION**



Conduct **CAPACITY BUILDING** activities to improve skills of agencies



The government is creating a “more competitive and enabling environment” Public Private Partnerships (PPPs) to accelerate infrastructure development.

Summary of PPP projects



as of 31 December 2022

210

**AWARDED
PROJECTS**

PHP 2,335 Billion

	No.	PhP (bn)	USD (bn)
National	88	2,156	39.58
Local	122	179	3.29

98

**PROJECTS
IN THE PIPELINE**

PHP 3,044 Billion*

	No.	PhP (bn)	USD (bn)
National	73	2,914	53.49
Local	25	130	2.39

1 USD = 55

**Total cost does not include projects undergoing studies and with costs that are yet to be finalized*



The government has a robust pipeline of PPP projects across key sectors.

PPP projects in the pipeline

TRANSPORTATION

	No.	PhP (bn)	USD (bn)
N	55	1,378.63	25.30
L	4	69.23	1.27
Total		1,447.86	26.57

VERTICAL INFRASTRUCTURE

	No.	PhP (bn)	USD (bn)
N	6	1,493.72	27.25
L	5	19.17	0.35
Total		1,512.89	27.6

DIGITAL CONNECTIVITY

	No.	PhP (bn)	USD (bn)
N	4	0.41	0.0075
L	1	0.02	0.00036
Total		0.43	0.00786

TOURISM

	No.	PhP (bn)	USD (bn)
N	1	TBD	TBD
L	2	11.69	0.21
Total		11.69	0.21

HEALTH

	No.	PhP (bn)	USD (bn)
N	6	26.41	0.48

SOLID WASTE MANAGEMENT

	No.	PhP (bn)	USD (bn)
L	3	22	0.39

POWER

	No.	PhP (bn)	USD (bn)
L	3	TBD	TBD

WATER SUPPLY AND SANITATION

	No.	PhP (bn)	USD (bn)
N	1	14.49	0.26
L	7	7.75	0.14
Total		22.24	0.40



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